



# ENERGY STAR Sales Data Collection

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# Importance of ENERGY STAR Market Share Data



- Key benchmark to determine the success of the national ENERGY STAR program over time.
- Indicator of the success of regional programs and promotions.
- Proof of the cost effectiveness of public funds programs for regulators and policymakers.
- Evidence for manufacturers and retailers of the progress and success of energy efficient product penetration.

# Appliance Sales Data Collection



- Using existing partner relationships, D&R has collected appliance sales data from “participating national ENERGY STAR retail partners” since 1997.
- First data and report released to cover the 1998 calendar year.
- Participating retailers submit ENERGY STAR sales and total sales by store and by quarter for each appliance type. Initial data collection can take months with several iterations necessary.
- All current retailers aggregate the sales on their own (i.e., we don’t receive model number or SKU data)

# Appliance Sales Data Collection



- D&R aggregates the retailer sales data and releases data by state, region, quarter, and appliance type.
- Utility reports are also usually available on request as long as the area includes enough retailers to preserve confidentiality.
- Full data is collected from each retailer so there is no sampling or weighting involved.
- 2003 data included 24% of room AC shipments, 47% of clothes washer shipments, 38% of dishwasher shipments, and 65% of refrigerator shipments
- Independent retailer data from utilities and implementers has been combined in the past upon request.

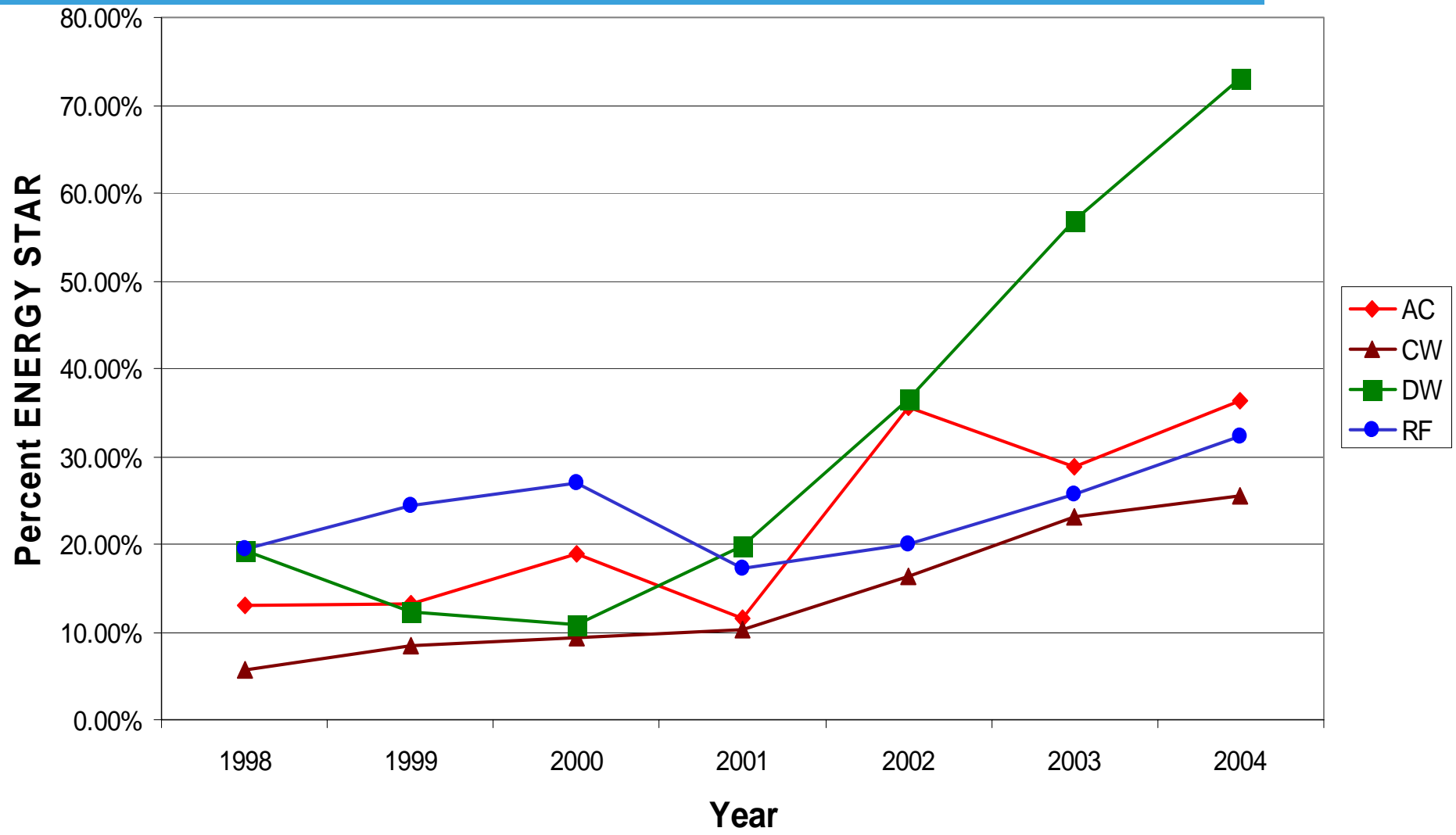
# Current ENERGY STAR Appliance Market Penetration



- Clothes Washers – 27.38%
- Dishwashers – 73.95%
- Refrigerators – 32.55%
- Room Air Conditioners – 37.01%

(All data is 2004 Quarter Two)

# ENERGY STAR Market Penetration



# AHAM Appliance Shipment Data



- D&R International purchased national ENERGY STAR appliance shipment data from the Association of Home Appliance Manufacturers (AHAM) for 2002.

Appliance Type	2002 D&R Data	2002 AHAM Data
Clothes Washers	16%	14%
Dishwashers	36%	48%
Refrigerators	20%	25%
Room Air Conditioners	36%	19%

# Double-Your-Savings Analysis



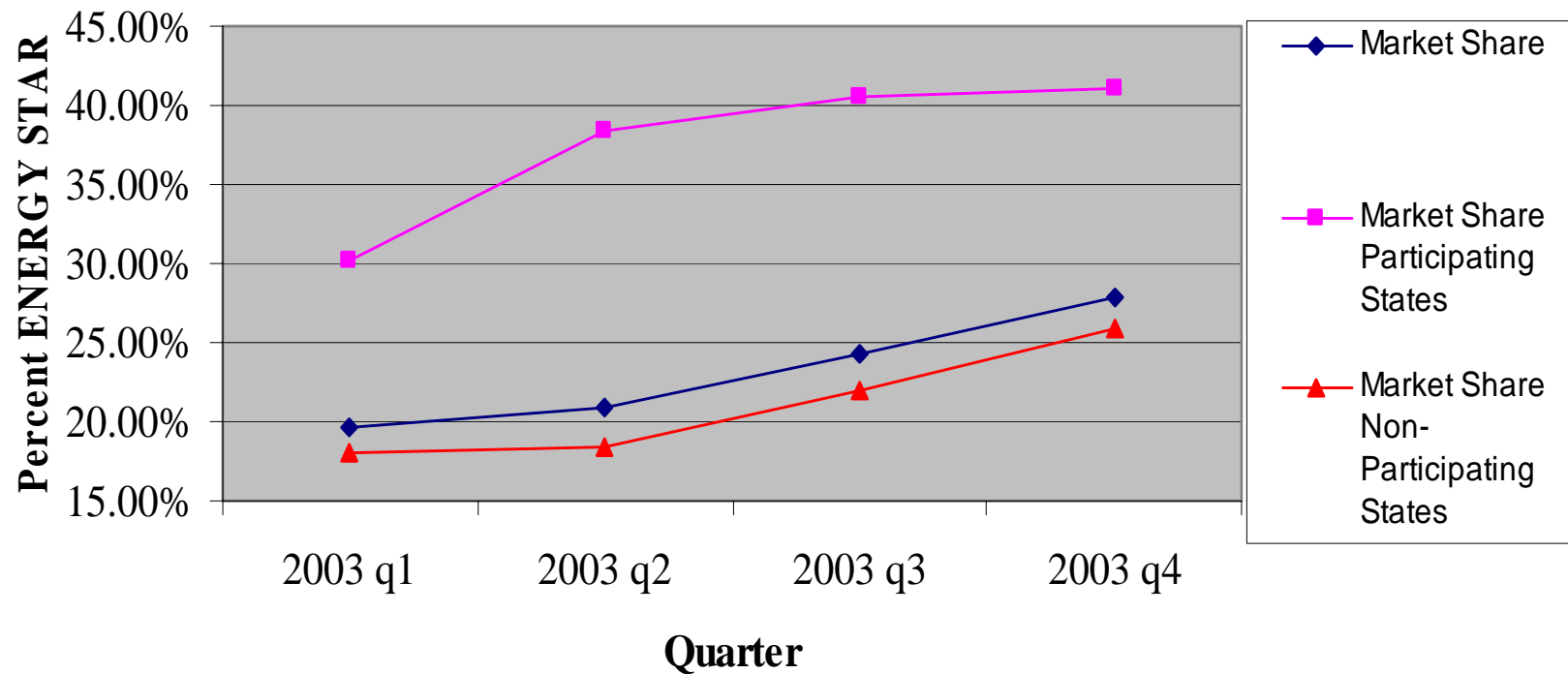
- Several manufacturers and retailers stated that the 2003 Double-Your-Savings with ENERGY STAR Clothes Washer Campaign provided a minimal sales lift.
- Total clothes washer sales dropped dramatically in quarter two of 2003.
- Sales data showed that although only four of the 14 participating states had an increase in the total number of ENERGY STAR qualified washer sales, the overall market share increased dramatically (ENERGY STAR sales increases of 19% to 58% from quarter one to quarter three).



# Double-Your-Savings Analysis



## ENERGY STAR Clothes Washer Market Share of Participating and Non-Participating States



# Active States Analysis



- Market penetration of ENERGY STAR qualified appliances much higher in states with active energy efficiency programs

Appliance Type	2003 Active States Market Penetration	2003 Inactive States Market Penetration
Clothes Washers	31%	18%
Dishwashers	58%	56%
Refrigerators	30%	23%
Room Air Conditioners	40%	19%

# Contact Information



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